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ABSTRACT

In addition to her filial responsibilities to an aging parent, a middle-aged woman typically has a variety of vocational, parental, marital, and social obligations. A role theory perspective was used to examine how women's competing obligations and conflicting filial norms can affect their relationships with their elderly mothers. The degree to which a daughter's perceived role strain was related to both the affectional quality of her relationship with her elderly mother and her elderly mother's psychological well-being was examined in 40 middle-aged women and 24 of their elderly mothers. Daughters completed a questionnaire on filial behavior, filial role strain, and relationship quality; rated the amount of assistance they gave their mothers; rated role conflict and role overload; and completed Bengston's Affectual Solidarity Scale. The 24 mothers completed a modified version of the Affectual Solidarity Scale and rated their current levels of happiness and loneliness. The results revealed that, compared to daughters who reported low levels of role strain, daughters who reported greater role strain had poorer quality mother-daughter relationships from the perspective of both daughter and mother, and their mothers had lower psychological well-being. These findings suggest that social policies and programs which relieve the role strain experienced by adult daughters may be of benefit to older parents. (NB)

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ROLE STRAIN IN MOTHER-DAUGHTER RELATIONSHIPS IN LATER LIFE

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Abstract

A role theory perspective is utilized to examine how women's competing obligations and conflicting filial norms can affect their relationships with their elderly mothers. Data from 40 middle-aged women and 24 of their mothers demonstrated that women who reported greater role strain had poorer quality mother-daughter relationships (from the perspective of both daughter and mother) and their mothers had lower psychological well-being. These results suggest that social policies and programs which relieve the role strain experienced by adult daughters may be of particular benefit for older adults.

Key words: Aging family, filial relationships, role conflict, women's roles, mid-life issues

In response to the instrumental, social and status losses of later life, older adults are most likely to turn to family members for assistance (Sussman, 1965). And, contrary to the popular notion of the "abandoned elderly," there is now ample evidence that adult children generally respond vigorously to the needs of their elderly parents (e.g., Shanas, 1962; Hill, 1970). Even in families which have been marked by hostile feelings, and a virtual absence of contact over most of the grown child's adulthood, a crisis in an elderly parent's life will almost always serve to mobilize a son or daughter to provide at least minimal assistance, if only during the acute crisis period (e.g., Sussman & Burchinal, 1962).

When an older parent is widowed, as are almost nine million older adults (Brody, 1981), it is most likely to be an adult daughter who assumes responsibility for providing whatever physical and emotional support is needed. Adams (1968), for example, found that daughters' contacts increased when their mothers became widowed, while sons' contacts declined. Moreover, such contact between mothers and daughters has been found to increase with the mother's age; thus, as many as 98% of women over the age of 80 live with or near one of their daughters (Shanas et al., 1968). And, cross-cultural studies have shown that most societies rely primarily on women to provide intergenerational linkages (as reported in Adams, 1968.)

Sources of Role Strain

The provision of support for an aging parent has become increasingly problematic for adult daughters in recent years, primarily as a result of widespread changes in women's lifestyles which have led to increased role

obligations. This is attributable in large part to the unprecedented increase in the number of women entering the work force, representing a 400% jump in the past 50 years (Brody, 1981). Moreover, this change has been greatest among those women most likely to have elderly parents. A recent report indicates that 62% of the women between the ages of 45 and 54 now work (U.S. Bureau of Labor Statistics, 1984), accounting for the largest increase in female labor force participation of any age group during the twenty year period from 1950 to 1970 (U.S. Department of Labor, 1977).

At the same time that middle-aged women are experiencing new work roles which may conflict with filial responsibilities, demographic shifts have increased the proportion of older adults for whom they may be responsible. Longer lifespans have resulted in a significant increase in the number of elderly adults, particularly the very-old elderly who are most likely to require assistance (Brotman, 1980). These changes, along with the decline in the birthrate, mean that a greater number of middle-aged women are being called upon to assist their elderly mothers and other elderly relatives for a longer period of time than ever before, and with less assistance from their siblings (Brody, 1985).

In addition to her filial responsibilities, a middle-aged woman typically has a variety of other vocational, parental, marital, and social obligations, as prescribed by societal and personal values. To the extent that her relationship with her mother is perceived as interfering with her ability to fulfill these other role demands and meet her own needs, a woman is apt to experience a sense of "role strain", which Goode defines as "the felt difficulty in fulfilling role obligations" (Goode, 1960, p. 483).

Of the numerous types of role strain, two seem particularly likely to affect women in their relationships with their elderly mothers: role demand

overload and role conflict. Role demand overload refers to the situation where a person "lacks sufficient personal time, energy and/or resources to fulfill the obligations of all the roles that he or she enacts" (Wallace & Noelker, 1984, p. 6). As Noelker & Poulshock (1982) have noted, role demand overload may be particularly likely among women who serve as the primary caregiver for an elderly parent in addition to their other responsibilities as employee, parent and spouse.

Role conflict refers to "incompatibilities in normative expectations" (Wallace & Noelker, 1984 p. 5), which can be interpersonal and/or intrapersonal (Komarovsky, 1976). For an adult daughter, role conflict is likely to occur as a result of the discrepancy between social exchange norms and communal norms regarding her filial role. On the one hand, social exchange norms prescribe that her costs (in time, energy and resources) be balanced by the benefits she receives (Clark & Mills, 1979). On the other hand, communal norms of mutual responsiveness require an adult daughter to do whatever she can to meet her elderly mother's personal needs, regardless of the cost to herself (Clark & Mills, 1979). Role conflict is apt to be exacerbated by the absence of clear norms regarding how to balance the conflicting requirements of such communal and exchange expectations.

Impact of Role Strain

Role strain, whether from role conflict or role demand overload, is likely to be accompanied by a sense of "filial distress", including feelings of guilt, resentment, frustration, and/or helplessness (e.g., Brody, 1981; Horowitz, 1982; Robinson & Thurnher, 1979; Scharlach & Frenzel, 1982). In addition, the daughter is likely to feel dissatisfied with her relationship with her elderly mother (Goode, 1960).

Previous research has not investigated the impact of a daughter's role

strain on the well-being of her elderly mother. However, it seems likely that when a daughter is dissatisfied with the quality of the mother-daughter relationship, her mother will tend to be dissatisfied, as well. Bengtson (1984) and Scharlach (1983), for example, have independently found significant correlations between the ratings of adults and their elderly parents regarding the affectual quality of their relationship with one another.

Moreover, decreased relationship satisfaction is apt to be associated with decreased psychological well-being for an elderly parent. In fact, satisfaction with family relationships has been shown to have a greater influence on an older adult's life satisfaction than does income, satisfaction with standard of living or satisfaction with health (Medley, 1976), particularly for elderly women (Watson & Kivett, 1976). The actual amount of contact and assistance an adult child provides, however, does not seem to be a strong predictor of an elderly parent's mental health (e.g., Arling, 1976, Fiore et al., 1982; Lee, 1979). Mutual satisfaction with the relationship, rather than the quantity of supportive contact, is likely to be a more important factor in the mother's psychological well-being (e.g., Baruch and Barnett, 1983; Duff & Hong, 1982; Weishaus, 1979).

Previous attempts to investigate how a daughter's role strain affects her elderly mother have been concerned primarily with examining the impact of a daughter's employment on the amount of contact and assistance she provides (e.g., Lang & Brody, 1983; Stoller, 1983). Very little attention has been given to qualitative outcome measures, which are likely to be more important for an elderly mother's well-being. As a result, virtually nothing is known about the effects of a daughter's role strain (whether due to employment, other role demands or role conflict) on her relationship with her mother or on the mother's psychological well-being.

The present study represented an attempt to investigate the role strain experienced by middle-aged women as a result of their attempts to fulfill their responsibilities to their elderly mothers. In particular, this study examined the degree to which an adult daughter's perceived role strain was related to 1) the affectional quality of her relationship with her elderly mother; and, 2) her elderly mother's psychological well-being.

Method

Subjects. The sample consisted of 40 women between the ages of 38 and 62 (average age = 50), who responded to notices advertising a free workshop for women whose elderly mothers were widowed, resided in the local metropolitan area, and were able to function independently. All of the adult daughters who participated were Caucasian; 22 were Jewish, 9 were Protestant, 3 were Catholic, and 6 had no religious preference. 38 of the 40 women had finished high school, and 24 of them had also finished college.

In 24 of the 40 cases, the daughters indicated that it would be possible also to interview their widowed mothers. The mothers ranged in age from 69 to 92 (mean age = 78), and did not require assistance with more than one of the physical activities of daily living (e.g., bathing, eating, ambulating independently). However, many of these elderly women did need help with some of the instrumental activities of daily living (e.g., house cleaning, shopping, transportation), which have been identified by Lawton and his colleagues (Lawton et al., 1982).

Measures. Each of the 40 daughters completed a questionnaire containing measures of filial behavior, filial role strain, and relationship quality. To assess the amount of assistance she was currently giving her mother, each daughter was asked to rate, on a six-point scale, how frequently she

actually provided each of 21 possible types of physical and emotional support which a community-dwelling older adult might need (as identified by Cicirelli (1981) and Lawton et al. (1982)).

A measure of role conflict was derived as follows: For these same 21 possible types of support, each daughter indicated, on a six-point scale, a) how frequently she should ideally provide assistance to her mother, if she were doing everything that she thought a daughter should do, given her mother's situation; and, b) how frequently it would be fair to expect her to provide such assistance, if she were to meet all of her other obligations. The difference between these two ratings, summed across the 21 items, served as a derived measure of a daughter's role conflict.

A direct measure of perceived role overload was obtained by asking each daughter to rate, on a five-point scale, how often she felt that she was doing more for her mother than was fair to expect of her, given all of her other obligations. In addition, a general assessment of role strain was obtained from responses to Zarit's Burden Interview (Zarit and Zarit, 1982), which asked each daughter to rate, on a five-point scale, the frequency with which she experienced feelings such as resentment, guilt, and not having enough time for herself, as a result of her interactions with her mother.

Relationship quality was assessed with a modified form of Bengtson's Affectual Solidarity Scale (Bengtson & Black, 1973), which included additional questions such as "How close do you feel to your mother?" and "How much do you enjoy your visits together?"

The 24 mothers were also asked to complete a modified version of the Affectual Solidarity Scale, reworded to reflect the mother's perspective. In addition, they responded to the Bradburn Affect-Balance Scale (Moriwaki, 1974), which has been shown to correlate with morale, life satisfaction,

happiness and (negatively) with degree of role loss among elderly adults (Moriwaki, 1974). The mothers also rated their current level of happiness, on a three-point scale, and indicated how frequently they felt lonely, on a four-point scale. A loneliness measure was included here because of its potential sensitivity to interpersonal distress, and because loneliness in the elderly has been found to correlate with signs of psychological distress, such as anxiety, dissatisfaction and depression (Perlman et al., 1978).

Results

Filial assistance. The types of assistance which the daughters most frequently reported providing were: emotional reassurance (provided by 37 of the 40 daughters, an average of 4-6 days a week), telephone contact (provided by 35 of the daughters, 5-6 days a week), visits to their mother (by 31 daughters, 1-2 days a week), and transportation (by 26 daughters, once a week).

INSERT TABLE 1 ABOUT HERE

As shown in Table 1, the amount of contact and assistance that a daughter provided was negatively related to her mother's ability to perform the physical and instrumental tasks of daily living ($r=-.60$, $p<.001$). That is, when a mother needed more assistance, her daughter was indeed apt to provide it. Furthermore, the more support a daughter provided, the greater her reported level of general role strain, as measured by the Burden Interview ($r=.41$, $p=.004$).

In consonance with the findings of other researchers, the amount of

assistance was not significantly correlated, however, with the daughters' or the mothers' ratings of affectual solidarity, nor with the mothers' scores on the measures of psychological well-being used here. Nor was the amount of assistance significantly correlated with the daughter's role conflict or perceived role overload.

Role Strain. As shown in Table 1, a daughter who experienced greater burden as a result of her interactions with her mother was apt to report a significantly lower level of affectual solidarity ($r=-.57$, $p<.001$). Her mother also tended to report somewhat poorer affectual solidarity ($r=-.29$, $p=.10$), and was likely to be somewhat less happy ($r=-.34$, $p=.06$), more lonely ($r=.35$, $p=.06$), and have a lower score on the Affect-Balance Scale ($r=-.36$, $p=.05$).

Role Conflict. A daughter's role conflict score, representing a derived measure of the potential conflict between her filial responsibilities and her other role obligations, was significantly correlated with her general level of role strain ($r=.45$, $p=.003$), as well as with her perceived level of role overload ($r=.56$, $p<.001$). In addition, a daughter who experienced greater role conflict was apt to report a somewhat poorer relationship with her mother on the Affectual Solidarity Scale ($r=-.24$, $p=.08$). The derived role conflict score was not significantly related, however, to the mother's ratings of affectual solidarity or psychological well-being.

Role Overload. A daughter who believed that she was doing more for her mother than was fair to expect of her, given her other obligations, was particularly likely to experience a high level of role strain ($r=.74$, $p<.001$), and also a low level of affectual solidarity ($r=-.65$, $p<.001$). Her mother also tended to rate the relationship more negatively on the Affectual Solidarity Scale ($r=-.43$, $p=.03$), and rated herself as being less happy ($r=-.42$, $p=.03$), more lonely ($r=.36$, $p=.05$), and more likely to have had

negative, rather than positive, affective experiences during the previous week, as reported on the Affect-Balance Scale ($r=-.50$, $p=.01$).

Role overload was especially prevalent among daughters who were employed full-time outside the home ($t=-2.69$, $p=.01$) or did not have siblings living nearby who might share the responsibility for their mother's well-being ($t=-1.79$, $p=.08$).

Employed daughters reported greater burden ($t=2.48$, $p=.02$) and poorer relationships ($t=-2.84$, $p=.007$). Their mothers also reported somewhat worse relationships ($t=-1.70$, $p=.10$). However, the amount of contact and assistance they provided was not significantly less than that provided by the daughters who were not employed ($t=-1.21$, $p>.20$).

Evidently, the more a daughter's attempts to help her mother conflict with her employment or other responsibilities, the more strain the daughter is likely to experience, the poorer the quality of the mother-daughter relationship, and the less the psychological benefit that the mother is apt to derive. One participant explained it this way:

> Ever since Dad passed away, I've done everything for my mother, just trying to make her feel better. Sometimes I've had to take time away from the kids or leave my job early in order to help her around the house or take her to the doctor or other places. But, she doesn't really seem to appreciate everything I do for her. And, what's worse, sometimes I'm not sure it's really making her any happier.

Discussion

Mother-daughter interdependence. This study has provided striking evidence that the well-being of an elderly mother and the well-being of her adult daughter are related to one another. The findings presented here indicate that when an adult daughter experiences strain in her attempts to help her elderly mother, the quality of the mother-daughter relationship (from the perspective of both daughter and mother) tends to suffer, and so does the mother's psychological well-being.

This emphasis on the interdependence of elderly women and their adult daughters represents a relatively new direction in the aging literature. Previous investigations have examined either the psychological well-being of an elderly mother or the strain experienced by her caregiving daughter, but have seldom attempted to demonstrate an association between the daughter's feelings and her mother's well-being. And yet, if the behavior and feelings of even a young infant can have a significant impact on its parent (e.g., Bell, 1968; Osofsky, 1976), it should not be surprising to find that an adult child's feelings might also affect its aging parent in important ways.

When the impact of a daughter's feelings and behavior on an elderly parent has been investigated, it has most often been with regard to the amount and type of tangible assistance she provides. Only recently has attention been given to the affectional quality of the filial relationship and its implications for an elderly parent's psychological well-being (e.g., Baruch & Barnett, 1983; Bromberg, 1983). This lack of empirical attention to relationship quality is particularly surprising, considering the existing evidence that qualitative aspects of filial relationships are more important to parental mental health than is the quantity of tangible assistance the parent receives.

The findings reported here underscore the importance of examining the family (or at least the parent-child dyad) as the unit of analysis, rather than focusing only on the individual parent or caregiving child in isolation from one another. An adult child is not simply a "caregiver" any more than her parent is simply a "dependent elder" (or "patient"). To see them as such is to ignore the significance of their ongoing relationship and the many ways in which they affect one another.

Role Strain. Role theory offers a particularly helpful perspective for understanding how an adult daughter's role obligations can affect her relationship with her mother and also the mother's well-being.

When role obligations compete with one another and produce a sense of role overload, both an adult daughter and her elderly mother are likely to suffer. Daughters in this study who experienced greater pressure from competing role obligations reported more strain and poorer mother-daughter relationships, while their mothers also reported worse relationships, less happiness, more loneliness and fewer positive affective experiences.

Previous investigations regarding role overload experienced by adult daughters primarily have been concerned with the impact of employment and other role obligations on a daughter's ability to provide contact and assistance for her elderly mother. Such studies have generally found, as we did, that employment has only a slight, and often non-significant, effect on the amount of assistance that daughters provide their elderly mothers (e.g., Horowitz et al., 1983; Lang & Brody, 1983; Stoller, 1983). However, to our knowledge, no previous study has demonstrated empirically that a daughter's employment is associated with an impairment in the quality of her relationship with her elderly mother or a decrease in the mother's reported psychological well-being.

The process by which a daughter's employment and other role obligations

affect her mother's well-being remains a matter of speculation at this time. One possibility is that whatever strain a daughter experiences as a result of competing role demands is manifested in subtle ways in her interactions with her mother, and thereby affects the quality of their relationship. For a widowed mother, who is apt to rely heavily on her daughter for emotional support (Lopata, 1973), evidence of her daughter's dissatisfaction or a disruption in the quality of their relationship may be particularly detrimental, regardless of the amount of assistance being provided. This may especially be true when the mother is relatively independent and does not need a great deal of assistance, as was the case for the elderly women in this study.

A second possibility is that the existence of competing role demands may make it more difficult for a daughter to provide support at a time and in a manner which would be most beneficial for her mother and herself. Evidence for this proposition comes from a recent study by Horowitz and her colleagues (Horowitz, et al., 1983), which found that working women are able to provide as much support for their elderly parents as do non-working women only by adhering to a rigid schedule and giving up whatever free time they have for themselves. As a result, they may not be able to help their parents at a time best suited to the parent's needs or their own desires.

As Horowitz and her colleagues note, such routinization of contact may have significant consequences for the quality, even if not the quantity, of support a daughter is able to give to her elderly parent. The result may be filial contact which is so oriented to meeting concrete needs that affectional aspects of the relationship may be neglected, with potential negative consequences for the well-being of both the elderly parent and the adult daughter, as Schmidt illustrates in the following example:

> Joan K. goes to her mother's house each day. Her mother proposes that they talk but Joan says there isn't time and does chores instead. Her mother thinks of more things for Joan to do in order to keep her there and she punctuates her orders with self-pitying remarks designed to make Joan feel guilty at leaving.
>
> (Schmidt, 1980, p. 262)

It is also possible for the direction of causality to be the other way around: an elderly mother's unhappiness may create added pressure on her daughter, thereby increasing the daughter's sense of role strain. Further research is needed to unravel the direction of these effects and better explicate the process by which conflicting obligations such as full-time employment can impair emotional aspects of a filial relationship and affect an elderly mother's psychological well-being, while not necessarily affecting the amount of contact or assistance that is being provided.

Societal Values and Public Policy. The conflict which an adult daughter is apt to experience between her filial responsibilities and her other needs and obligations reflects society's unrealistic and often contradictory expectations regarding the appppropriate role behavior of middle-aged women.

On the one hand, a woman is expected to be a "good daughter," meeting virtually all of her elderly parent's social and emotional needs, as women supposedly did "in the good old days." At the same time, she is expected to fulfill the other extensive role obligations of the middle years and meet her own personal needs. The conflict that this is likely to engender has been described poignantly in the words of one woman in her middle thirties:

> WHAT'S HAPPENED TO ME? I'm like the rope in a tug of war between my parents and my children. I always seem to be needed in two places at the time and I'm never in the

> right one. When I'm with my parents I'm always asking myself, "What am I doing here? I ought to be with my children." And when I'm with my children I'm always asking myself, "What am I doing here? How can I leave my old parents along so much?" It's awful to feel so guilty all the time. But do you know there's something even worse? It's that little voice inside my head that's always crying out, "What about me? When is there going to be time for me? Doesn't anybody care?
>
> (Silverstone and Hyman, 1982, p. 12)

To date, society has done little to resolve such role conflicts. Attempts to define public policy regarding filial responsibility have been confused and often contradictory, and have largely ignored important demographic shifts such as the increased number of older adults, the increased length of time they will need support, and the increased pressure on adult daughters as a result of employment and other obligations, all of which make filial responsibility much more problematic than ever before (Brody, 1985).

A more beneficial and realistic public policy must demonstrate less concern for ways to legislate increased filial responsibility (e.g., Newman, 1980), and demonstrate more concern for programs and services that can improve the quality of life for both an elderly parent and her adult child. Older adults and their children need to know that comprehensive community support services are available, and that caregiving children will receive a respite when needed. Job-sharing and flexible hours for both men and women might further ease the burden adult daughters now experience. Perhaps more importantly, societal values and expectations regarding appropriate filial

behavior must change, so that filial roles may be guided by norms which are consistent with one another and with the demographic and social realities of today's world.

As this study has shown, the well-being of both the elderly parent and the adult child are inextricably bound up with one another. And, when an adult daughter experiences role strain as a result of competing obligations and conflicting role norms, not only is her relationship with her mother likely to suffer, but so is the mother's psychological well-being.

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Table 1

Intercorrelations among measures of filial assistance, role strain and relationship quality (Pearson correlation coefficients)

	Daughter			
	Assistance Given	Burden	Role Conflict	Role Overload
Daughter				
Burden	.41**			
Role conflict	.18	.45**		
Role overload	.24+	.74***	.56***	
Affectual solidarity	.04	-.57***	.24+	-.65***
Employed	-.24+	.36*	.25+	.38**
Local siblings	.15	-.02	-.28+	-.33*
Mother				
Affectual solidarity	.24	-.29+	-.14	-.43*
Happiness	.28	-.34+	.12	-.42*
Loneliness	-.15	.35+	-.04	.36*
Affect-balance	.23	-.36*	.05	-.50**
Activities of daily living	-.60***	-.25	-.16	.25

+ $p < .10$

* $p < .05$

** $p < .01$

*** $p < .001$